

The European market potential for vases

Between 2014 and 2018, the European market for vases grew considerably, with developing countries as one of the main suppliers. You can supply vases to both consumer and project markets. In the project market, larger pieces and pieces that make more of a statement, are in particularly high demand. Trends for the garden mean that vases are being used outdoors, as well. Particular opportunities can be found in the handmade segment and in the recycling or use of renewable materials.

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1. Product description

A vase is an open container, often used to hold cut flowers. In the home market, vases are usually categorised as home accessories. As such, they are often grouped with items such as statuettes and figurines, wall decoration, candles and candle holders. This study uses the following codes in reference to vases:

Table 1: Product codes

Harmonised System (HS)	Prodcom	Description
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7013.3110	2313.1310	Glassware made of lead crystal, of a kind used for table or kitchen purposes, gathered by hand (excluding articles of heading 7018, drinking glasses, glass preserving jars "sterilising jars", vacuum flasks and other vacuum vessels)
7013.4110		Glassware made of lead crystal, of a kind used for table or kitchen purposes, gathered by hand (excluding articles of heading 7018, drinking glasses, glass preserving jars "sterilising jars", vacuum flasks and other vacuum vessels)
7013.4991		Glassware of a kind used for table or kitchen purposes, gathered by hand (excluding toughened glass and glass having a linear coefficient of expansion $\leq 5 \times 10^{-6}$ per kelvin within a temperature range of 0 to 300°C, glassware of glass ceramics or lead crystal, articles of heading 7018, drinking glasses, glass preserving jars "sterilising jars", vacuum flasks and other vacuum vessels)
7013.9110		Glassware made of lead crystal, of a kind used for toilet, office, indoor decoration or similar purposes, gathered by hand (excluding glassware of a kind used for table or kitchen purposes, drinking glasses, articles of heading 7018, mirrors, leaded lights and the like, lighting fittings and parts thereof, atomisers for perfume and the like)

7013.3190	2313.1330	Glassware made of lead crystal, of a kind used for table or kitchen purposes, gathered mechanically (excluding articles of heading 7018, drinking glasses, glass preserving jars "sterilising jars", vacuum flasks and other vacuum vessels)
7013.4190		Glassware made of lead crystal, of a kind used for table or kitchen purposes, gathered mechanically (excluding articles of heading 7018, drinking glasses, glass preserving jars "sterilising jars", vacuum flasks and other vacuum vessels)
7013.9190		Glassware made of lead crystal, of a kind used for toilet, office, indoor decoration or similar purposes, gathered mechanically (excluding glassware of a kind used for table or kitchen purposes, articles of heading 7018, mirrors, leaded lights and the like, lighting fittings and parts thereof, atomizers for perfume and the like)
7013.4999	2313.1350	Glassware of a kind used for table or kitchen purposes, gathered mechanically (excluding toughened glass and glass having a linear coefficient of expansion $\leq 5 \times 10^{-6}$ per kelvin within a temperature range of 0 to 300°C, glassware made of glass ceramics or lead crystal, articles of heading 7018, drinking glasses, glass preserving jars "sterilising jars", vacuum flasks and other vacuum vessels)
6913.1000	2341.1330	Statuettes and other ornamental ceramic articles made of porcelain or china not elsewhere specified
6913.9010	2341.1350	Other statuettes and other ornamental ceramic articles
6914.1000	2349.1230	Ceramic articles made of porcelain or china, not elsewhere specified
6914.9000	2349.1250	Ceramic articles not elsewhere specified (excluding of porcelain or china)
3926.4000	2229.2620	Statuettes and other ornamental articles, made of plastics

8306.2100	2599.2400	Statuettes and other ornaments, made of base metal, plated with precious metal (excluding works of art, collector's pieces and antiques)
8306.2910		Statuettes and other ornaments, made of copper not plated with precious metals (excluding works of art, collector's pieces and antiques)
4420.1011	1629.1300	Statuettes and other ornaments, made of okoumé, obeche, sapelli, sipo, acajou, d'afrique, makoré, iroko, tiama, tiama, mansonina, ilomba, dibétou, limba, azobé, dark red meranti, light red meranti, meranti bakau, white lauan, white meranti, white seraya, yellow meranti, alan, keruing, ramin, kapur, teak, jongkong, merbau, jelutong, kempas, virola, mahogany "swietenia spp.", imbuia, balsa, palissandre de rio, palissandre de para and palissandre de rose (excluding wood marquetry and inlaid wood)
4420.1019		Statuettes and other ornaments, made of wood (excluding okoumé, obeche, sapelli, sipo, acajou, d'afrique, makoré, iroko, tiama, tiama, mansonina, ilomba, dibétou, limba, azobé, dark red meranti, light red meranti, meranti bakau, white lauan, white meranti, white seraya, yellow meranti, alan, keruing, ramin, kapur, teak, jongkong, merbau, jelutong, kempas, virola, mahogany "swietenia spp.", imbuia, balsa, palissandre de rio, palissandre de para and palissandre de rose; wood marquetry and inlaid wood)

Quality

Functionality

Vases that display cut flowers need to be able to hold water. For glazed ceramics and glass, this water-resistance is a given. Other materials like wood or paper may need an inner coating or glass container. Vases used for artificial flowers or purely decorative purposes do not have to be water resistant. Shapes can vary according to consumer taste. They also depend on whether vases are designed to hold bunches or single flowers. In general, garden vases need to be light and durable.

Material

Vases can be made from various materials, such as:

- ceramics
- glass

- metal
- paper
- synthetics
- rubber
- wood
- recycled materials
- composites

Glass and ceramic vases are the most common. However, the need for design flexibility and varying consumer preferences stimulate the use of different materials. Each material has a different look, feel and customer appeal.

Aesthetic quality

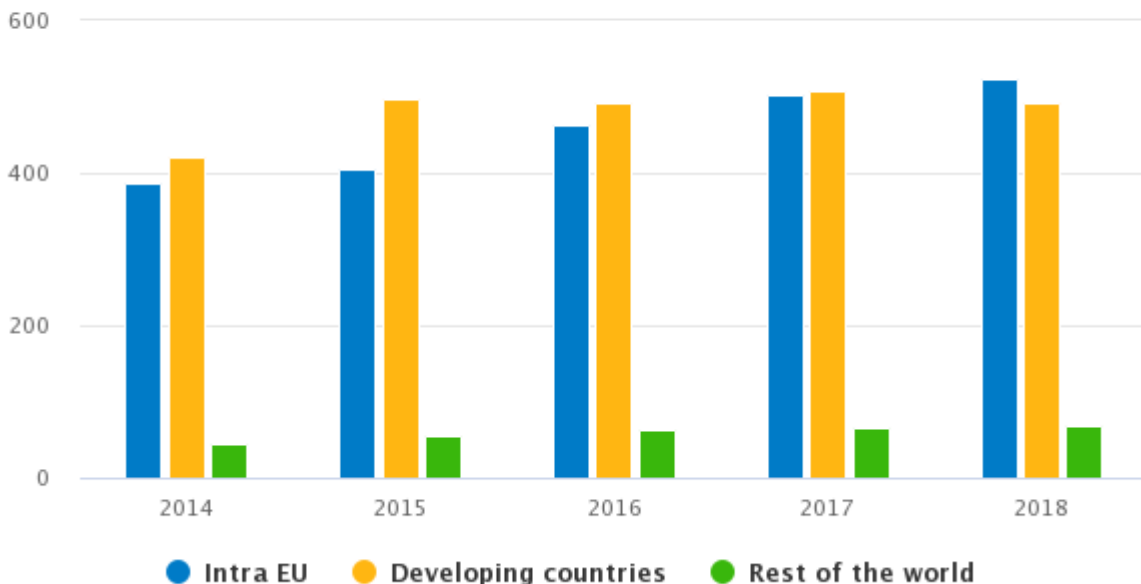
The vase has become a valued home accessory in its own right. It needs to appeal to different market segments, with different requirements in terms of shape and decoration. Generally, levels of innovation rise as the segments move up. Over the years, vases have evolved from having the conventional cylinder or belly shapes to more exuberant and innovative designs.

2. What makes Europe an interesting market for vases?

Europe’s demand for vases is higher than its production. This drives the need for imports, making Europe an interesting market. Between 2014 and 2018, the total imports of vases to Europe increased from €854 million in 2014 to more than €1 billion in 2018. The average annual growth between 2014 and 2018 was 6.1%. By comparison, global imports grew at an average rate of 5% between 2014 and 2018. European imports of vases accounted for almost 38% of the total global imports of vases.

Figure 1: European imports of vases

in € million



Source: Trademap

In 2018, 45% of the total European import value came from developing countries. As shown in Figure 1, until 2017 developing countries were the leading suppliers of vases to Europe, with exports reaching a value of €509 million. In 2018 intra-EU trade took over the leading position, based on local production and dynamic re-exportation of goods between European countries. Imports from developing countries grew significantly between 2014 and 2015, after which they remained relatively stable, hovering around €500 million per year.

The average yearly growth rate stood at almost 4% between 2014 and 2018.

The European market for vases is expected to continue to offer interesting opportunities. The European consumer is increasingly bringing nature and the garden into their homes. Using flowers and plants as a decoration is an ideal way of creating this feeling in their homes. Moreover, in the European culture, flowers continue to be a popular gift. These are a few of the key drivers that will stimulate the growth in the vase market in Europe.

Tip:

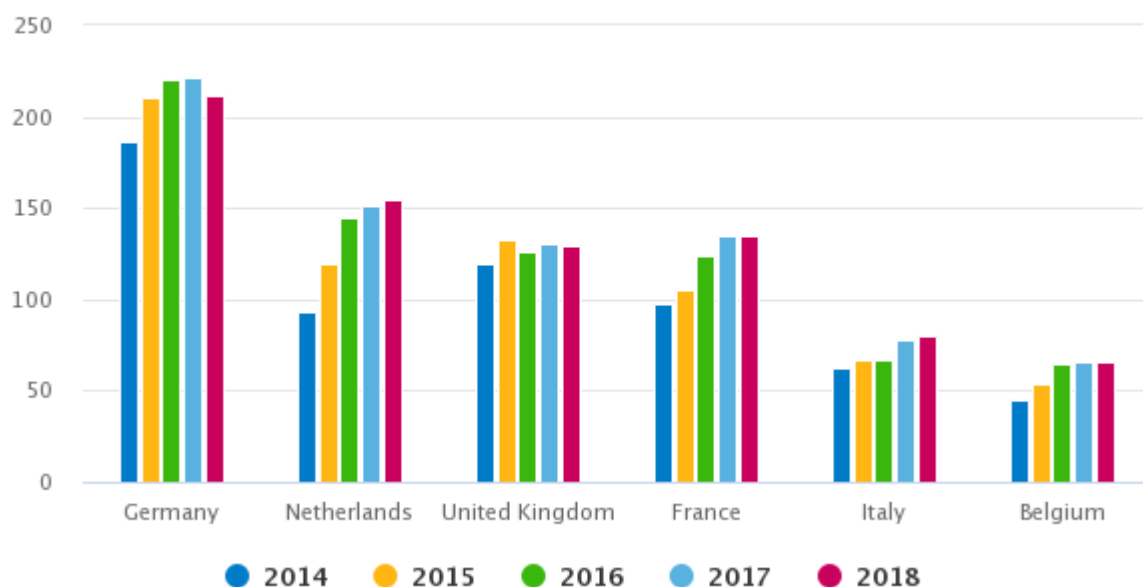
Keep track of European trends in both vases and interior design, to anticipate future changes in the sector by visiting European trade fairs such as [Ambiente](#), Frankfurt, Germany (February), [Maison et Objet](#), Paris, (January and September), [Tendence](#), Frankfurt, August.

3. Which European countries offer most opportunities for vases?

Germany is the biggest import market for vases in Europe, recording a value of more than €200 million in 2018. The country is followed by the Netherlands, the United Kingdom and France. Italy and Belgium are the other two countries in the top six EU import markets.

Figure 2: Leading importing countries of vases, 2014–2018

in € million



Source: Trademap

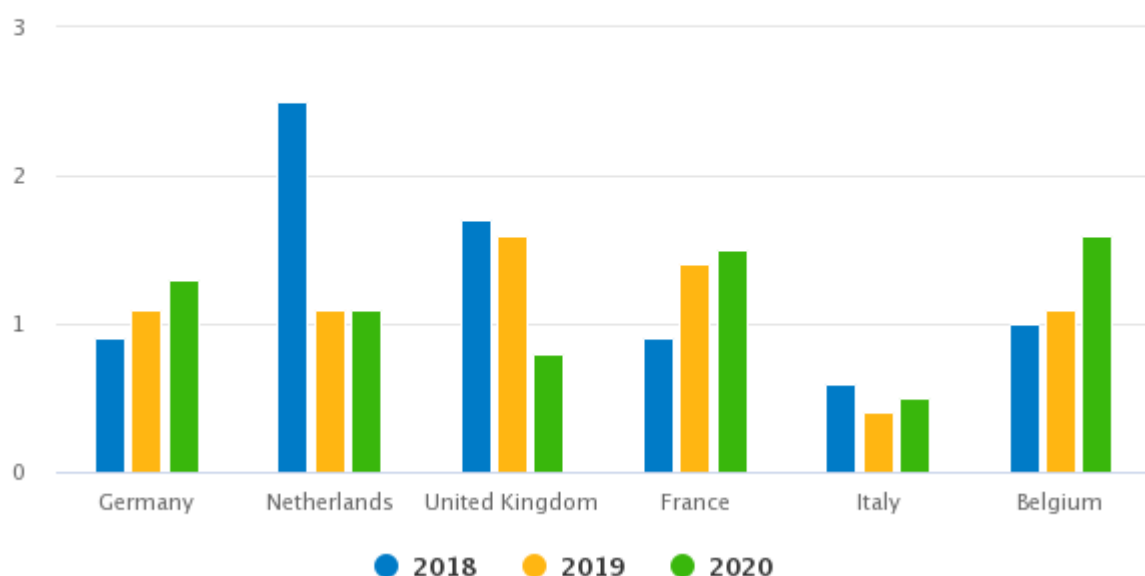
Real private consumption expenditure

Private consumption expenditure includes all purchases made by consumers, such as food, housing (rents), energy, clothing, home accessories, health, leisure, education, communication and transport, as well as hotel and restaurant services. It is an important indicator for the European home accessories market. The sector is closely linked to economic conditions. When economic circumstances and prospects are dim, consumers postpone buying non-essential items. Conversely, when economic conditions are favourable, private consumption expenditure and purchases of non-essential home accessories surge.

Especially in emerging markets, consumers will have more money available to spend on these products. Consumers in mature markets already spend a fair amount of money on luxury items, so growth in their consumption is expected to be moderate.

Looking at the main vase markets in Europe, we see that private consumption expenditure growth is forecast to be most pronounced in Belgium. A slightly upward trend is expected in the coming years in the German, French and Italian economies. In the United Kingdom and the Netherlands, the opposite is expected to happen, largely due to the uncertainty and loss of consumer confidence due to the withdrawal of the United Kingdom from the European Union ([Brexit](#)).

Figure 3: Real private consumption expenditure growth in % (year on year)



Source: Eurostat

Germany: main market with potential

As shown in Figure 2, Germany is not only the biggest import market for vases, the imports increased every year between 2014 and 2017. In 2018, the growth came to an end, and dropped slightly compared to the previous year. The country is responsible for 20% of the total European imports of vases. Germany sources 57% of its vases from developing countries. The average growth of imports from developing countries reached 2.9% between 2014 and 2018.

Germany is the largest economy in Europe and is home to 16% of the total European population. The German economy is widely considered the stabilising force within the European Union. Private consumption expenditure is expected to increase by 1.3% compared to the previous year. Although Germany is a mature market, the combination of private consumption expenditure increase and the large share and growth of imports from developing countries, show that conditions are favourable for market growth.

The Netherlands relies heavily on imports from developing countries

The second largest market for vases in Europe is the Netherlands. Dutch imports of vases account for 14% of the total European imports. The country rapidly recovered from a drop in 2013, reaching a total import value of €155 million in 2018. With an average growth rate of 13% per year, the Netherlands is the fastest growing import market of vases in Europe. Moreover, the country sources over 60% of the vases from developing countries, equivalent to an import value of €94 million. Between 2014 and 2018, the average growth of imports from developing countries was 7%. Overall, conditions for growth are favourable.

Private consumption expenditure growth in the Netherlands is forecast to drop from 2.5% in 2018 to 1.1% in 2019. The Brexit, in addition to the international trade disputes between the United States and China, have a big impact on the Netherlands. The country is strongly dependent on international trade and negative developments in that respect have an amplified effect on the country's economic performance. This will likely have an effect on the country's economic growth, consumer confidence and consumption of vases.

At the same time, it should be noted that the impact on imports of vases extends beyond the country itself, since the Netherlands is a big re-exporter of goods. As such, developments in other European countries will also play a role. Given the economic slowdown in Europe as a whole, a sharp increase in imports is not expected. On the other hand, a decrease is not likely either, since the economies will still grow, albeit at a slower pace.

The United Kingdom: Brexit expected to have a negative impact

Imports of vases into the United Kingdom fluctuated between 2014 and 2018. In 2014, the total import value was €119 million, while in 2018 it reached €129 million. The average growth rate in the same period was 2% per year. The share of the total European imports reached 12% in 2018. The United Kingdom sources 57% of its vases from developing countries. The total value reached €73 million in 2018. The average growth rate of imports from developing countries was negligible.

Although modest economic growth is projected for 2019 and 2020, Brexit is expected to continue to have a negative impact on the United Kingdom's consumer's confidence throughout 2019 and 2020. This is also reflected in the private consumption growth, as shown in Figure 3. The growth in the United Kingdom is falling and that is likely to have an impact on the demand for vases.

France sees positive growth in imports from developing countries

France is responsible for 12% of the total European imports of vases. French imports of vases showed an increasing trend between 2014 and 2017 and stabilised in 2018 at a total import value of €135 million. The average growth in the same period was 8.4%.

In 2018, 30% of the total imports of vases came from developing countries, a relatively small share compared to United Kingdom, the Netherlands and Germany. However, the average yearly growth of imports from developing countries was positive between 2014 and 2018, reaching 8.2%.

France's economy is the third largest in the European Union. In 2019 and 2020, France is expected to see economic growth of 1.3% and 1.4%, respectively.

Although economic growth in France slowed down and global uncertainties and the effects of social unrest weighed on consumer confidence in 2018, projections for 2019 and 2020 are positive with an increase in private consumption expenditure expected. The positive growth in both imports in total and imports from developing countries and the increase in private consumption expenditure is likely to have an increasing impact on the demand for vases.

The Italian market is stagnating

Italy is one of the smaller markets and accounted for only 7% of the total European imports of vases. However, the country saw a similar increasing trend as France and the Netherlands. In 2014 the total import value was €62 million, in 2018 this increased to €80 million. The average growth between these years was almost 7%.

Italy sources almost 40% of its imported vases from developing countries. The average growth per year is modest at 1.7%.

Italy is the slowest-growing economy in the European Union and experienced a period of stagnation in 2018 and 2019. The European Commission has forecast economic growth of 0.1% in 2019 and 0.7% in 2020. The stagnating market and the modest growth in both private consumption expenditure and imports from

developing countries show that the indicators are not very favourable for the Italian market.

Belgium sees steady growth in imports

Belgium, the smallest import market for vases of the six countries, accounts for 6% of the total European imports. Between 2014 and 2016, Belgian imports of vases grew steadily, reaching €65 million in 2016. In the years after that (2017-2018), growth stabilised. Total imports reached €66 million in 2018. The average growth rate stood at around 10% between 2014 and 2018. However, this was mainly due to the significant growth seen in 2015 (19%) and 2016 (20%).

34% of the Belgian imports come from developing countries, reaching an import value of €22 million in 2018. The average growth was negative at -1%. Belgian private consumption expenditure grew at the fastest rate of the six leading importers. The expected growth for 2020 is 1.6%. The year before this was 1.1%.

However, the stabilising growth in total imports of vases and the negative growth trends when it comes to imports from developing countries, mean Belgium is not the most interesting market to focus on.

Tips:

Check the latest developments on [ITC Trademap](#). ITC Trademap offers details regarding trade volumes and values, per year and per importing and exporting country.

Target leading Western European importing countries of vases. The combination of import growth and the a relatively stable economic outlook offers opportunities for you as an exporter. The most interesting markets are Germany, the Netherlands and France.

4. What trends offer opportunities on the European market for vases?

From functional to emotional

Vases have evolved from serving primarily as a vehicle for displaying flowers to being home accessories in their own right. So, they are no longer purely functional (holding the water for flowers). They also have added emotional value; vases are now seen as an accessory that adds to the style of the consumer's interior. Vases are therefore found in a broader range of segments and can range from everyday basics to status symbols. These various types of vases are influenced by a few of the current major consumer trends.

Image 1: Set of neutral coloured vases in different shapes and sizes used as style elements in the home



Home sweet home: vases make the home cosier

This trend has two components. Firstly, it is about a slightly older consumer retreating into the safety and security of their own home, and making it into a perfect, luxurious oasis. More broadly, it relates to the fact that the home is also the place where genuine connection takes place with close friends and relatives. This is done by eating, cooking and enjoying entertainment together. This is also referred to as “cocooning”. As an important home accessory, the vase is playing a role in both aspects of the trend.

Whether or not you can Successfully position yourself in these product groups will depend your ability to match your design capability to your production concept. Broadly speaking, if you are a manufacturer with processes which are fairly mechanised, for instance in ceramics or glass, this may well position you in the more “everyday basics” segment, where you will cater to a lower- and lower-middle end customer base.

If your concept is based on handmade items, and/or a the use of a combination of materials, this may place you in the mid-high segment of this product group. Then, it is essential to incorporate innovative design and high-level aesthetics into your products. Trade fairs are an ideal platform for studying the industry.

The older consumer following this trend will opt for vases from brands with a long heritage, and so you may have a hard time pleasing these consumers. The younger consumer groups, especially the Millennials, do not tend to prefer the traditional brands and new entrants may well be able to market to them successfully. However, while this consumer group does not have an intrinsic need for branded products, they also tend to be less loyal to particular brands than older consumers and are price sensitive.

Tips:

Study the segmentation in the market to discover your niche. Trade fairs like [Ambiente](#), Frankfurt, Germany (February), [Maison et Objet](#), Paris, France (January and September), [Tendence](#), Frankfurt, Germany (August) are an ideal platform for doing so.

To reach the younger consumer groups, target importing wholesalers and retailers, with a strong online presence.

Wellness: say it with flowers

Today's consumer is actively in search of physical and mental wellbeing. Feeling close to nature helps the consumer feel healthy and invigorated. Having flowers and plants is an ideal way of creating a garden inside the home (see special The Garden), hence the importance of vases and plant containers, in general. In European culture, flowers are also a popular gift, which helps people form connections and bond with each other. Moreover, flowers also constitute an important element in the accepted spiritual and physical wellness rituals of yoga and visiting spas.

In their primary function as a container for flowers, vases are an ideal wellness item and gift. A wide variety of design elements are used; depending on the type of customer, bright or muted colours, bold or accepted shapes and materials and sizes can vary. As for the yoga and spa setting, the vases usually have a refined style.

The wellness trend is also extending to the office, where more attention is being paid to mental and physical wellbeing, too. Flowers and plants serve an important function in creating a happy workplace.

At the interface between the home sweet home and wellness trends, we are seeing the lines blur between indoor and outdoor spaces, and the increasing popularity of outdoor vases. Plant pots in any size could already be found in the garden, and have been adapted to the indoor style, but we are now also seeing the outdoor vase appearing/re-appearing in materials that can withstand various weather conditions and in a style consistent with that of the living room.

Tip:

Use natural materials, colours and finishes, so that the vase itself is reminiscent of nature, as well. This will add value for specific target groups.

The people- and planet-friendly vase

More than ever, social- and environmental-friendliness is influencing the consumer's buying behaviour. Wherever possible, consumers opt for products that avoid wasteful consumerism, excess and wasteful materials, and that are fair to the makers. This also applies to such a major home accessory as the vase.

To generate the added value that sustainability can lend to your concept, your offering must have verifiable sustainable aspects, such as being made of renewable materials and produced in a way that is human and environmentally friendly, having a limited footprint (e.g. in transport), and facilitating a recycling process at the end of its use.

Realize that no company is perfectly sustainable yet, but that every manufacturer can and needs to contribute to a better future for people and the planet. Consumers today are savvier and more aware than ever. Especially the new groups of Millennial consumers and professional buyers are quite inclined to "vote with their wallet" and favour concepts that are sustainable.

Green Living is a company from Vietnam that successfully tapped into these trends by using natural and sustainable materials, such as bamboo and recycled rubber.

Tips:


Think about how you can achieve the added value that sustainability can offer, and invest in consulting and process improvements to achieve a more sustainable concept.


Communicate your values on and offline (on the product), to cash in on the added value that sustainability can offer. If desired, you can consider validating your sustainable values with the help of the appropriate certifications, such as [ISO 14001](#), [SA 8000](#) or fair trade systems. Help the importer and consumer feel good about having contributed to a better ecosystem by making a sustainable purchase in vases.


This study was carried out on behalf of CBI by [Globally Cool B.V.](#) in collaboration with GO! GoodOpportunity.

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